# Regional Depository Meeting October 14 –16, 2004

Holiday Inn on the Hill Washington, D.C.

**GPO - Working with FDLP Regional Libraries** 

Submitted By:

C<sup>2</sup> Technologies, Inc. 1921 Gallows Road, Suite 840 Vienna, VA 22182 (703) 748-2780 www.c2ti.com

OPM Contract # - OPM-01-01051 Project Code B80VTAAF-GPO Work Order # NA

FINAL November 2, 2004

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#### **EXECUTIVE SUMMARY**

The Regional Meeting was held to provide a forum for regional librarians to discuss current Topics facing regional libraries in the FDLP.

The format for the Regional Meeting includes 10-15 minutes presentations followed by breakout sessions. The objectives of the breakout sessions were to:

- Brainstorm the Topic;
- Reach consensus on the Topic;
- Focus on the "what" and not the 'how to" relating to the Topic; and
- Develop actions items for partnership follow up after the meeting.

Breakouts teams were comprised of one Table Captain, Recorder and 8 to 10 rotating participants.

A summary of the consensus statements and action items are contained within this report. Larry Blevins, Director, Office of Education and Development will send the breakout session summaries to each regional librarian and table participants via email.

#### 1. REGIONAL MEETING TOPICS AND PRESENTERS

Торіс	Presenter	Date	Time
GPO's Integrated Library System	Laurie Beyer Hall, Office of Bibliographic Services	Thursday, Oct 14	8:00 – 9:30 p.m.
Future of Regionals: What Is the Relationship Between Regionals and Selectives In an Electronic Environment?	Bill Sudduth, University of South Carolina and Beth Rowe, University of North Carolina	Friday, Oct 15	8:30 – 10:00 a.m.
Future of Regional Libraries: What Does It Mean to Be an All-Electronic Regional?	Jan Comfort, Clemson University	Friday, Oct 15	10:30 – 12:00
Future of Regional Libraries: Best Practices	Geoffrey Swindells, University of Missouri	Friday, Oct 15	1:30 – 3:00 p.m.
Future of Regional Libraries: A Plan for a Regional Performance Survey Tool	Tim Byrne, University of Colorado	Friday, Oct 15	3:30 – 5:00 p.m.
Relinquishing Regional Status	John Phillips, Oklahoma State University	Saturday, Oct 16	8:30 – 10:00 a.m.
Consultant Initiative/Training and Development	Larry Blevins, Director, Office of Education and Development	Saturday, Oct 16	10:30 – 12:00

Topic	Presenter	Date	Time
Collection of Last Resort	Janet Scheitle, Director, Office of Library Program Planning	Saturday, Oct 16	1:30 – 3:00 p.m.
Wrap-Up and Closing Remarks	Marianne Ryan, University of Maryland and Judith Russell, Super intent of Documents	Saturday, Oct 16	3:30 – 5:00 p.m.

### 2. REGIONAL MEETING EVALUATION

A summary of the evaluations is included within this document.

### 3. SUMMARY

The Regional Depository Meeting closed with a series of action items for GPO and its partners. FDLP participants requested that they receive the summary of their census statements and action items via email.

### **Breakout Session Notes:**

**Date**: 10/14/2004 **Start Time**: 08:00 p.m. **End Time**: 9:30 p.m.

Topic: GPO's Integrated Library System

Presenter: Laurie Beyer Hall, Director, Office of Bibliographic Services, GPO

 Table Captain:
 Judy Andrews
 Recorder:
 Sarah Cieslik

Email Address: andrewsj@pdx.edu Email Address: scieslik@gpo.gov

#### Consensus

GPO ILS's system compatibility to the individual ILS's, and its free and public accessibility are the key concerns for this group. Certain desired and essential features are as follows:

- Search and sort by SuDoc Numbers
- Inclusion of SuDoc Numbers in the records
- Inclusion of stable urls for electronic publications and link checker
- Inclusion of all holdings and check-in capabilities with the serial records

In addition, it is imperative to have an on-going communication with the library community during the process of ringing up the OPAC, and updating records and procedures.

Action Items	Assigned Responsibility	Comments
Free and Public Accessibility For Individual Libraries		How will ILS's be able to use the information?
		Does it replace monthly catalog?
Search & Sort Capabilities		To include the history & full records
Records for Electronic		Will they continue using PURLS?
Publications (856)		Will there be a link checker?
		Will the 856 be stable?
		Will the records be updated as older documents are scanned into the system?
Serials		Will there be serial holdings attached?
		Will there be a "Check-in" record? Retrospective?
		Find out about all issues printed, not just ones distributed through FDLP

Name	Institution	Email Address
Judy Andrews	Portland State University	andrewsj@pdx.edu
Sarah Cieslik	GPO	scieslik@gpo.gov
Mary Brewer	Arkansas State Library	mbrewer@asl.lib.ar.us
Herrick Heitman	Washington State Library	hheitman@secstate.wa.gov
Rob Jackson	Denver Public Library	rjackson@denver.lib.co.us
Roth Cochran	University of Idaho	ruth@uidaho.edu
Laura Saurs	Newark Public Library	lsaurs@npl.org
Donna Vavrek	Louisiana Tech University	dvavrek@latech.edu

### **Breakout Session Notes:**

**Date:** 10/14/2004 **Start Time:** 08:00 p.m. **End Time:** (;30 p.m.

Topic: GPO's Integrated Library System

Presenter: Laurie Beyer Hall, Director, Office of Bibliographic Services, GPO

Table Captain:Tim ByrneRecorder:Cindy Etkin

Email Address: tim.byrne@colorado.edu | Email Address: cetkin@gpo.edu

#### **Consensus**

GPO has a lot of work to do with Records Evolution of policies and practices in Catalog and Class.

- One record per title if all formats noted in record
- Clear policies for permissions and viewing

Action Items	Assigned Responsibility	Comments
Find out more about plans for implementing various modules		
<ul><li>Acq</li><li>Serials control</li><li>Authority</li><li>Circ</li></ul>		
Clear policies for permissions and viewing		Library bridge between GPO Records and Public
Linking ILS to Collection – bar coding piece inventory control issue		
Create a working collection for GPO		
One record per title – all formats noted		
Added value into record – local notes – superseded, substitution, etc.		

Name	Institution	Email Address
Tim Byrne	University of Colorado	tim.byrne@colorado.edu
Cindy Etkin	GPO	cetkin@gpo.gov
Marianne Mason	University of Iowa	marianne-mason@uiowa.edu
Doug Conrads	Indiana State Library	dconrads@statelib.lib.in.us
Sandra Groleau	Bates College Library	sgroleau@bates.edu
Bill Sudduth	University of South Carolina	Sudduthw@gwm.sc.edu
Barbie Selby	University of Virginia	bselby@virginia.edu
Jennie Burroughs	University of Montana	jennie.burroughs@umontana.edu

#### **Breakout Session Notes:**

**Date:** 10/14/2004 **Start Time:** 08:00 p.m. **End Time:** 9:30 p.m.

Topic: GPO's Integrated Library System

Presenter: Laurie Beyer Hall, Director, Office of Bibliographic Services, GPO

 Table Captain:
 Laurie Canepa
 Recorder:
 Betty Jones

#### Consensus

In order to provide quality service to the public, the ILS should incorporate the following:

- A friendly search screen
- Enhanced linking capabilities such as to publishing agency
- Functional PURLS and Print-On-Demand
- Patron capability to export search results via e-mail
- Multiple index functionality such as report numbers, SuDoc, LC and Dewy, and full bibliographic records with complete serial holdings.

Action Items	Assigned Responsibility	Comments
Keep the individual ILSs informed on developments		

Name	Institution	Email Address
Laurie Canepa	New Mexico State Library	laurie@stlib.state.nm.us
Betty M. Jones	GPO	bjones@gpo.gov
Saundra Williams	University of Memphis	swilliam@memphis.edu
Dan Barkley	University of New Mexico	barkley@unm.edu
Susan Troyan	Texas State Library	stroyan@tsl.state.tx.us
Laura G. Harper	University of Mississippi	lgharper@olemiss.edu
Beth L. Rowe	UNC – Chapel Hill	rowe@refstaff.lib.unc.edu
Mike Ragen	Illinois State Library	mragen@ilsos.net

### **Breakout Session Notes:**

**Date:** 10/14/2004 **Start Time:** 08:00 p.m. **End Time:** 9:30 p.m.

Topic: GPO's Integrated Library System

Presenter: Laurie Beyer Hall, Director, Office of Bibliographic Services, GPO

 Table Captain:
 Jan Comfort
 Recorder:
 Michele Worthington

Contact Phone: (864) 656-5168 Contact Phone:

#### Consensus

We want to ensure that GPO maintains the integrity of the cataloging records while keeping production on schedule, especially during the transition.

GPO needs to be sure to communicate with the depository library community and the cataloging community.

GPO also needs to tap into expertise available within the depository community.

We want everything to be fast, free, accurate and complete.

Action Items	Assigned Responsibility	Comments
Plans for pre-76. Will ILS replace MOCAT?		
Maintain the integrity of cataloging records, fast, free, accurate, but keep the production of cataloging high, especially during the transition.		
On-going communication with depository and cataloging communities		
Enhance collection management in depository libraries	ILS	
Create reports	ILS	

Name	Institution	Email Address
Jan Comfort	Clemson University	comforj@clemson.edu
Michele Worthington	GPO	mworthington@gpo.gov
John Walters	Utah State University	johwal@ngw.lib.usu.edu
Ric Davis	GPO	rdavis@gpo.gov
Gil Baldwin	GPO	ebaldwin@gpo.gov
Deborah Mongeau	University of Rhode Island	
Marianne Ryan	University of Maryland	mr190@umail.umd.edu
Beth Harper	University of Wisconsin, Madison	bharper@library.wisc.edu

#### **Breakout Session Notes:**

**Date:** 10/14/2004 **Start Time:** 8:00 p.m. **End Time:** 9:30 p.m.

Topic: GPO's Integrated Library System

Presenter: Laurie Beyer Hall, Director, Office of Bibliographic Services, GPO

 Table Captain:
 Maureen Olle

 Recorder:
 Janet Scheitle

### **Consensus:**

For the first 2 years working with the ILS, the focus should be on the current items.

Action Items	Assigned Responsibility	Comments
Clarify how ILS will link to CLR & National Bibliography		
Retrospective cataloging (pre- 1976)	GPO	
Use current item to optimize cataloging workflow		

Name	Institution	Email Address
Maureen Olle	Louisiana State University	molle@lsu.edu
Janet Scheitle	GPO	jscheitle@gpo.gov
Daniel Cornwall	Alaska State Library	dan_cornwall@eed.state.ak.us
Charles Bernholz	University of Nebraska, Lincoln	cbernholz2@unl.edu
Jeff Bullington	University of Kansas	jsbullington@ku.edu
Linda Johnson	University of New Hampshire	linda@cisunix.unh.edu
Nancy Peluso	Connecticut State Library	npeluso@cslib.org

### **Breakout Session Notes:**

Topic: GPO's Integrated Library System

Presenter: Laurie Beyer Hall, Director, Office of Bibliographic Services, GPO

Table Captain:Tom RohrigRecorder:Joe Paskoski

#### **Consensus:**

Develop a trustworthy database which would control consistent search results:

- New, updated records pushed out to depositories with updates retrospectively
- Ability to import records
- Content to include pre-76 records with ability to ability to monitor vendor performance

Action Items	Assigned Responsibility	Comments
Trustworthy database - comprehensive		Concern of including pre-76 records/links

Name	Institution	Email Address
Tom Rohrig	Texas Tech University	tom.rohrig@ttu.edu
Joe Paskoski	GPO	jpaskoski@gpo.gov
Ann Sanders	Library of Michigan	asanders@michigan.gov
David Cismowski	California State Library	dcismowski@library.ca.gov
Gwen Sinclair	University of Hawaii, Manoa	gsinclai@hawaii.edu
Pat Ragains	University of Nevada, Reno	regains@unr.edu
John Phillips	Oklahoma State University	bart@okstate.edu
Janet Fisher	Arizona State Library & Archives	jfisher@lib.az.us

### **Breakout Session Notes:**

**Topic**: GPO's Integrated Library System

Presenter: Laurie Beyer Hall, Director, Office of Bibliographic Services, GPO

Table Captain:Kathy HaleRecorder:Robin Haun-Mohamed

Email Address: khale@state.pa.us Email Address: rhaun-mohamed@gpo.gov

#### **Consensus:**

Our group wants the government document library community to be involved in the process. Ideally, the aforementioned community would form a focus group serving as the liaison between GPO (vendor) and users. With active participation from the library community, GPO will be able to meet the expectation of perfection required by the community.

Following are few ideas:

- Utilizing ILS's expertise in SuDoc sort
- GPO to become a member of the North American Olive Users Group
- To be more involved in the system as a whole

Action Items	Assigned Responsibility	Comments
Creation of a focus group to provide feedback / be a liaison between GPO, vendor and the users		

Name	Institution	Email Address
Kathy Hale	State Library of Pennsylvania	khale@state.pa.us
Robin Haun-Mohamed	GPO	rhaun-mohamed@gpo.gov
Laurie Beyer Hall	GPO	lhall@gpo.gov
Julia Wallace	University of Minnesota	j-wall@umn.edu
Jan Swanbeck	University of Florida	janswan@mail.uflib.ufl.edu
Sandra McAnnich	University of Kentucky	mcaninch@uky.edu
John Stevenson	University of Delaware	varken@udel.edu

### **Breakout Session Notes:**

Topic: GPO's Integrated Library System

Presenter: Laurie Beyer Hall, Director, Office of Bibliographic Services, GPO

 Table Captain:
 Geoffrey Swindells
 Recorder:
 Gretchen Schlag

#### **Consensus:**

This table has concerns or questions about the capabilities of the ILS and its relationship to depository library operations, including:

- Loading of Bibliographic Records into local catalogs
- Whether FRBR will be implemented
- The scope of records that will be included in the CLS
- How it will support selection and distribution activities

The table is also concerned about the management of the ILS, the distribution of roles between GPO and the contractor and the security and safety of the bibliographic data.

We would also like to know more about the planning for the retrospective conversion project.

Action Items	Assigned Responsibility	Comments
Better explanation of ILS capabilities and what it means to the libraries	GPO	
Know more about the "service provider" environment	GPO	What does it mean to GPO and regionals?
Know more about the retrospective conversion project	GPO	

Name	Institution	Email Address
Geoff Swindells	University of Missouri	swindellsg@missouri.edu
Gretchen Schlag	GPO	gschlag@gpo.gov
Susan C. Field	University of Georgia	scfield@uga.edu
Audrey L. Hall	State Library of Ohio	ahall@sloma.state.oh.us
Christine Chang	West Virginia University	cchang@wvu.edu
Lucy Farrow	Auburn University, Montgomery	lfarrow1@mail.aum.edu
Cathy Sagendorf	New York State Library	csagendo@mail.nysed.gov

#### **Breakout Session Notes:**

Topic: Future of Regionals: What Is the Relationship Between Regionals and Selectives in an

Electronic Environment?

Presenters: Bill Sudduth, University of South Carolina and Beth Rowe, University of North

Carolina

Table Captain:Judy AndrewsRecorder:Suzanne Ebanues

Email Address: andrewsj@pdx.edu Email Address: sebanues@gpo.gov

#### **Consensus:**

More concentrated effort is needed from GPO to partner with Regionals in ways to transition to the electronic era. While the ILS and cataloging the legacy collection will help, libraries need permanent urls for this material. GPO should provide a paid consultant in each regional library to help provide training and outreach.

Action Items	Assigned Responsibility	Comments
Paid consultant in every regional		

Name	Institution	Email Address
Judy Andrews	Portland State University	andrewsj@pdx.edu
Suzanne Ebanues	GPO	sebanues@gpo.gov
Pat Ragains	University of Nevada, Reno	regains@unr.edu
Rob Jackson	Denver Public Library	rjackson@denver.lib.co.us
David Cismowski	California State Library	dcismowski@library.ca.gov
Gil Baldwin	GPO	ebaldwin@gpo.gov
Dan Barkley	University of New Mexico	barkley@unm.edu
Marianne Mason	University of Iowa	marianne-mason@uiowa.edu

### **Breakout Session Notes:**

Topic: Future of Regionals: What Is the Relationship Between Regionals and Selectives in an

**Electronic** Environment?

Presenters: Bill Sudduth, University of South Carolina and Beth Rowe, University of North

 Table Captain:
 Tim Byrne
 Recorder:
 Kathy Brazee

#### **Consensus:**

The survey does not adequately assess the space problem. Offsite storage is often affected by cataloging. Budget problems affect travel and training opportunities. The Fall Federal Depository Library Conference is extremely important. It needs to be continued and possibly expanded; furthermore, there is a need for more opportunities for local training, including distance education. GPO needs to help libraries with new statistics. GPO also needs to provide more help with centralization of downloading electronic files.

Action Items	Assigned Responsibility	Comments
Continue Fall Federal Depository Library Conference		Consider ways to improve (i.e. offer more web streaming, other relevant technologies, set aside fund for a Selective from each state to attend, etc.)
Assist with retro cataloging	GPO	Allows selectives to discard more Allows regional to move more of collection
Devise ways to measure public service	GPO	i.e. GPO Access stats PURLs stats

Name	Institution	Email Address
Tim Byrne	University of Colorado	tim.tyrne@colorado.edu
Kathy Brazee	GPO	kbrazee@gpo.gov
Jeff Bullington	University of Kansas	jsbullington@ku.edu
Laura Harper	University of Mississippi	lgharper@olemiss.edu
Jan Swanbeck	University of Florida	janswan1@ufl.edu
John Phillips	Oklahoma State University	bart@okstate.edu
Ann Sanders	Library of Michigan	asanders@michigan.gov
Beth Harper	University of Wisconsin, Madison	bharper@library.wisc.edu

#### **Breakout Session Notes:**

Topic: Future of Regionals: What Is the Relationship Between Regionals and Selectives in an

Electronic Environment?

Presenters: Bill Sudduth, University of South Carolina and Beth Rowe, University of North

Table Captain:Laurie CanepaRecorder:John Dowgiallo

#### **Consensus:**

Now that we have the raw data, how do we ensure that the different constituencies, regionals, GPO, academic and non-academic institution will be involved in thorough review and analysis and implementation of findings.

Action Items	Assigned Responsibility	Comments
Create a new plan based on the results of the survey based on the trends reflected in the survey	All parties	

Name	Institution	Email Address
Laurie Canepa	New Mexico State Library	laurie@stlib.state.nm.us
John Dowgiallo	GPO	jdowgiallo@gpo.gov
Laura Saurs	Newark Public Library	lsaurs@npl.org
Mary Brewer	Arkansas State Library	mbrewer@asl.lib.ar.us
Janet Fisher	Arizona State Library & Archives	jfisher@lib.az.us
Frank D'Andraia	University of Montana	frank.dadraia@umontana.edu
Mike Ragen	Illinois State Library	mragen@ilsos.net
Christine Chang	West Virginia University	cchang@wvu.edu
Cathy Sagendorf	New York State Library	csagendo@mail.nysed.gov

#### **Breakout Session Notes:**

**Topic**: Future of Regionals: What Is the Relationship Between Regionals and Selectives in an

Electronic Environment?

**Presenters**: Bill Sudduth, University of South Carolina and Beth Rowe, University of North

 Table Captain:
 Jan Comfort
 Recorder:
 Robin Haun-Mohamed

#### **Consensus:**

Given the pace of the present of this excellent presentation, it was difficult for us to absorb the complex and rich data, particularly relating to staffing, administrative support (including travel) and strategic planning.

Action Items	Assigned Responsibility	Comments
Work with GPO to provide variety of distance training taking advantage of technology, Q&A chat, webcast, etc.		

Name	Institution	Email Address
Jan Comfort	Clemson University	comforj@clemson.edu
Robin Haun-Mohamed	GPO	rhaun-mohamed@gpo.gov
Charles Bernholz	University of Nebraska, Lincoln	cbernholz2@unl.edu
Linda Johnson	University of New Hampshire	linda@cisunix.unh.edu
Marianne Ryan	University of Maryland	mr190@umail.umd.edu
Daniel Cornwall	Alaska State Library	dan_cornwall@eed.state.ak.us

#### **Breakout Session Notes:**

Topic: Future of Regionals: What Is the Relationship Between Regionals and Selectives in an

Electronic Environment?

Presenters: Bill Sudduth, University of South Carolina and Beth Rowe, University of North

Table Captain:Maureen OlleRecorder:Cindy Etkin

Email Address: molle@lsu.edu Email Address: cetkin@gpo.gov

#### **Consensus:**

Agencies should be mandated to take a lead role in electronic planning of government information. GPO should develop a strategic plan for born digital publication.

Action Items	Assigned Responsibility	Comments
To actively work on implementing the consensus statement.		

Name	Institution	Email Address
Maureen Olle	Louisiana State University	molle@lsu.edu
Cindy Etkin	GPO	cetkin@gpo.gov
Audrey L. Hall	State Library of Ohio	ahall@sloma.state.oh.us
Herrick Heitman	Washington State Library	hheitman@secstate.wa.gov
Susan Troyan	Texas State Library	stroyan@tsl.state.tx.us
Steve Beleu	Oklahoma Dept. of Libraries	sbeleu@oltn.odl.state.ok.us
John Walters	Utah State University	johwal@ngw.lib.usu.edu
Susan C. Field	University of Georgia	scfield@uga.edu

Topic: Future of Regionals: What Is the Relationship Between Regionals and Selectives in an

Electronic Environment?

Presenters: Bill Sudduth, University of South Carolina and Beth Rowe, University of North

 Table Captain:
 Tom Rohrig
 Recorder:
 Laurie B. Hall

#### **Consensus:**

GPO needs to create a plan to protect the legacy tangible collection that exists in both the Regionals and Selectives. GPO needs to acknowledge the need for aforementioned by providing resources to Regionals in order that the Regionals may build a collaborative working relationship.

Action Items	Assigned Responsibility	Comments
Develop a rational plan for legacy collection		

Name	Institution	Email Address
Tom Rohrig	Texas Tech University	tom.rohrig@ttu.edu
Laurie B. Hall	GPO	lhall@gpo.gov
Donna Vavrek	Louisiana Tech University	dvavrek@latech.edu
Lucy Farrow	Auburn University, Montgomery	lfarrow1@mail.aum.edu
Julie Wallace	University of Minnesota	j-wall@umn.edu
Saundra Williams	University of Memphis	swilliam@memphis.edu
Ruth Cochran	University of Idaho	ruth@uidaho.edu

Topic: Future of Regionals: What Is the Relationship Between Regionals and Selectives in an

**Electronic Environment?** 

Presenters: Bill Sudduth, University of South Carolina and Beth Rowe, University of North

Carolina

#### **Consensus:**

Regionals should form a partnership with GPO to pool resources to increase collection development and to look for more partnership opportunities with other agencies. Partnership with GPO should also include more regional training opportunities.

Action Items	Assigned Responsibility	Comments
To develop a plan for collection development of archiving tangible and non-tangible government documents.		
Be involved in strategic planning when changes occur within GPO.		
State Meetings		GPO involved in state plans – perhaps conference should be held in states.

Name	Institution	Email Address
Kathy Hale	State Library of Pennsylvania	khale@state.pa.us
Michele Worthington	GPO	mworthington@gpo.gov
Gwen Sinclair	University of Hawaii, Manoa	gsinclai@hawaii.edu
Gretchen Schlag	GPO	gschlag@gpo.gov
Jennie Burroughs	University of Montana	jennie.burroughs@umontana.edu
Barbie Selby	University of Virginia	bselby@virginia.edu

Topic: Future of Regionals: What Is the Relationship Between Regionals and Selectives in an

**Electronic Environment?** 

Presenters: Bill Sudduth, University of South Carolina and Beth Rowe, University of North

Carolina

#### **Consensus:**

The digital environment was leveling the differences between Regionals and Selectives in terms of access to current material, while support of the legacy collection, not only remained the primary role of the Regional, but becomes increasingly important as the Selectives shift to primarily electronic collections. In this environment, the delivery of print material to Selectives and reference support for historical collectives becomes even more important and new tools like the ILS and technologies can help us achieve this.

Action Items	Assigned Responsibility	Comments
GPO and Depositories should work together to develop methods for representing holdings of legacy collections that are accessible to the public.		

Name	Institution	Email Address
Geoff Swindells	University of Missouri	swindellsg@missouri.edu
Joe Paskoski	GPO	jpaskoski@gpo.gov
Sandra McAninch	University of Kentucky	mcaninch@uky.edu
Deborah Mongeau	University of Rhode Island	dmongeau@uri.edu
Nancy Peluso	Connecticut State Library	npeluso@cslib.org
Sandra Groleau	Bates College Library	sgroleau@bates.edu
John Stevenson	University of Delaware	varken@udel.edu

**Date**: 10/16/2004 **Start Time**: 10:30 a.m. **End Time**: 12:00

Topic: Future of Regional Libraries: What Does It Mean to Be an All-Electronic Regional?

**Presenter**: Jan Comfort, Clemson University

Table Captain:July AndrewsRecorder:Joe PaskoskiContact Phone:(503) 725-4126Contact Phone:

### **Consensus:**

Without an example of all-electronic Regional, there remain many uncertainties and questions. No statutory provision has been made. With all-electronic FDLP, GPO needs to be the central agency to coordinate the harvesting and bibliographic access to the electronic collections. There will be a continued need for a formal relationship between GPO and libraries to sustain free, public access to government information to the citizens of the United States.

Action Items	Assigned Responsibility	Comments
Make it so!		

Name	Institution	Email Address
Judy Andrews	Portland State University	andrewsj@pdx.edu
Joe Paskoski	GPO	jpaskoski@gpo.gov
David Cismowski	California State Library	dcismowski@library.ca.gov
Rob Jackson	Denver Public Library	rjackson@denver.lib.co.us
Pat Ragains	University of Nevada, Reno	regains@unr.edu
Marianne Mason	University of Iowa	Marianne-mason@uiowa.edu
Dan Barkley	University of New Mexico	barkley@unm.edu

Topic: Future of Regional Libraries: What Does It Mean to Be an All-Electronic Regional?

**Presenter**: Jan Comfort, Clemson University

 Table Captain:
 Tim Byrne
 Recorder:
 Janet Scheitle

#### **Consensus:**

We think that it is important that Jan is doing this project. Legacy collection should be digitized before we can be predominantly electronic Regionals; however, we feel that it is dangerous to rush into dumping tangible collection. It is important to note that there are still many unknown in the electronic environment.

Action Items	Assigned Responsibility	Comments
Change terminology from "All- Electronic" to "Predominantly- Electronic" Regional		
Assure preservation of current born electronic.		
Expand what is being preserved to non-traditional information such as legislator web pages.		

Name	Institution	Email Address
Tim Byrne	University of Colorado	tim.tyrne@colorado.edu
Janet Scheitle	GPO	jscheitle@gpo.gov
NO ATTENDANCE SHEET		

Topic: Future of Regional Libraries: What Does It Mean to Be an All-Electronic Regional?

**Presenter**: Jan Comfort, Clemson University

 Table Captain:
 Laurie Canepa
 Recorder:
 Cindy Etkin

#### **Consensus:**

In an electronic environment, Regionals must find unique ways of contributing valued and valuable services to constituents. An opportunity exists to enhance the role of regional librarians as government information specialists. There are also opportunities to collaborate with GPO in digitization projects. More effective use of space as in space devoted to fugitive documents of regional interest and relevancy to direct constituents.

Action Items	Assigned Responsibility	Comments
Partner with GPO in the identification and digitization of fugitive documents and documents beyond the scope of the FDLP, which are in the scope of the National Bibliographic		

Name	Institution	Email Address
Laurie Canepa	State Library of New Mexico	laurie@stlib.state.nm.us
Cindy Etkin	GPO	cetkin@gpo.gov
Janet Fisher	Arizona State Library & Archives	jfisher@lib.az.us
Frank D'Andraia	University of Montana	frank.dandraia@umontana.edu
Mike Ragen	Illinois State Library	mragen@ilsos.net
Christine Chung	West Virginia University	cchang@wvu.edu
Cathy Sagendorf	New York State Library	csagendo@mail.nysed.gov
Laura Saurs	Newark Public Library	lsaurs@npl.org
Mary Brewer	Arkansas State Library	mbrewer@asl.lib.ar.us

Topic: Future of Regional Libraries: What Does It Mean to Be an All-Electronic Regional?

**Presenter**: Jan Comfort, Clemson University

Table Captain:Marianne RyanRecorder:L. B. Hall

#### **Consensus:**

An all-electronic regional is a misnomer. Regionals are not one-size fits all collections; they will continue to have mixed media collections. Electronic information is only one component. Regional depositories also have legacy collections to which they continue to provide access and expert service.

Action Items	Assigned Responsibility	Comments
Encourage projects that cover other aspects of being a Electronic Regional	GPO	
Explore model where Regionals have actual custody of electronic material (GPOACCESS files)		
Project to explore the public service as well as services to Selectives aspect of an electronic regional		

Name	Institution	Email Address
Marianne Ryan	University of Maryland	mr190@umail.umd.edu
L. B. Hall	GPO	lhall@gpo.gov
Linda Johnson	University of New Hampshire	linda@cisunix.unh.edu
Daniel Cornwall	Alaska State University	dan_cornwall@eed.state.ak.us
Charles Bernholz	University of Nebraska, Lincoln	cbernholz2@unl.edu
Bill Sudduth	University South Carolina	sudduthw@gwm.sc.edu
Beth L. Rowe	UNC - Chapel Hill	rowe@refstaff.lib.unc.edu

Topic: Future of Regional Libraries: What Does It Mean to Be an All-Electronic Regional?

**Presenter**: Jan Comfort, Clemson University

 Table Captain:
 Maureen Olle

 Recorder:
 Robin Haun-Mohamed

Email Address: molle@lsu.edu Email Address: rhaun-mohamed@gpo.gov

#### **Consensus:**

An all-electronic regional would allow more time for other tasks, such as training. Such a set-up will blur the difference between Regionals and Selectives.

Action Items	Assigned Responsibility	Comments
Address preservation of electronic government information in order to maintain the integrity of the historical record of the federal government.	GPO	
Provide more training to Selectives and other libraries.	Regionals	
Develop an agency liaison program to focus on training issues for products & services	Regional & GPO	

Name	Institution	Email Address
Maureen Olle	Louisiana State University	molle@lsu.edu
Robin Haun-Mohamed	GPO	rhaun-mohamed@gpo.gov
Audrey L. Hall	State Library of Ohio	ahall@sloma.state.oh.us
Herrick Heitman	Washington State Library	hheitman@secstate.wa.gov
Susan Troyan	Texas State Library	stroyan@tsl.state.tx.us
Steve Beleu	Oklahoma Dept of Libraries	sbeleu@oltn.odl.state.ok.us
John Walters	Utah State University	johwal@ngw.lib.usu.edu
Susan C. Field	University of Georgia	scfield@uga.edu

#### **Breakout Session Notes:**

Topic: Future of Regional Libraries: What Does It Mean to Be an All-Electronic Regional?

**Presenter**: Jan Comfort, Clemson University

 Table Captain:
 Tom Rohrig
 Recorder:
 John Dowgiallo

#### **Consensus:**

To be an all-electronic regional, would still be dealing with tangible items and service to Selectives. There is a question of whether we would still be a Regional if we became an all-electronic regional.

Action Items	Assigned Responsibility	Comments
Clarify ramifications of being all- electronic regional		

Name	Institution	Email Address
Tom Rohrig	Texas Tech University	tom.rohrig@ttu.edu
John Dowgiallo	GPO	jdowgiallo@gpo.gov
Ruth Cochran		
Donna Vavrek	Louisiana Tech University	dvavrek@latech.edu
Doug Conrads	Indiana State Library	dconrads@statelib.lib.in.us
Lucy Farrow	Auburn University, Montgomery	lfarrow1@mail.aum.edu
Julie Wallace	University of Minnesota	j-wall@umn.edu
Saundra Williams	University of Memphis	swilliam@memphis.edu

#### **Breakout Session Notes:**

**Topic**: Future of Regional Libraries: What Does It Mean to Be an All-Electronic Regional?

**Presenter**: Jan Comfort, Clemson University

Table Captain:Kathy HaleRecorder:Kathy Brazee

Email Address: khale@state.pa.us Email Address: kbrazee@gpo.gov

#### **Consensus:**

Our Concern is about the equitable access of electronic information and maintenance of permanent access to electronic information with migration to new technology. We want the increased use of virtual reference services. We still need a core collection of tangible items including maps.

Action Items	Assigned Responsibility	Comments
Re-training and re-evaluation of our staff		

Name	Institution	Email Address
Kathy Hale	State Library of Pennsylvania	khale@state.pa.us
Kathy Brazee	GPO	kbrazee@gpo.gov
Barbie Selby	University of Virginia	bselby@virginia.edu
Jennie Burroughs	University of Montana	jennie.burroughs@umontana.edu
Gretchen Schlag	GPO	gschlag@gpo.gov
Gwen Sinclair	University of Hawaii, Manoa	gsinclai@hawaii.edu

Topic: Future of Regional Libraries: What Does It Mean to Be an All-Electronic Regional?

**Presenter**: Jan Comfort, Clemson University

 Table Captain:
 Geoff Swindells
 Recorder:
 Suzanne Ebanues

#### **Consensus:**

Despite the promise of an all-electronic regional, we are not there yet, and in fact, it may be more correct to speak of a substantial-electronic regional. Among the building blocks necessary for permanent public access to digital publications are assurance of duplication and authentication of digital objects and the presence of cataloging for these objects. In addition, we will probably always require the ability to acquire and hold tangible publications.

Action Items	Assigned Responsibility	Comments
Cooperative efforts to catalog and archive digital content and to provide distributed access to both that content and its metadata.	GPO & Depository Community	

Name	Institution	Email Address
Geoff Swindells	University of Missouri	swindellsg@missouri.edu
Suzanne Ebanues	GPO	sebanues@gpo.gov
Sandra McAninch	University of Kentucky	mcaninch@uky.edu
Deborah Mongeau	University of Rhode Island	dmongeau@uri.edu
Nancy Peluso	Connecticut State Library	npeluso@cslib.org
Sandra Groleau	Bates College Library	sgroleau@bates.edu
John Stevenson	University of Delaware	vartek@udel.edu

**Topic**: Future of Regional Libraries: Best Practices

Presenter: Geoffrey Swindells, University of Missouri, Columbia

Table Captain:Judy AndrewsRecorder:Joe Paskoski

### **Consensus:**

We divided out consensus into two parts: What we talked about and what we didn't

- What we talked about: Putting energy into developing great web pages because that is how people get the information, developing expertise that Selectives can take advantage of and training sessions.
- What we didn't talk about but needed to be included: Collections, both tangible and electronic, digitization, access to these collections, maintaining legacy software and preservation issues.

Action Items	<b>Assigned Responsibility</b>	Comments
Need a place to exchange ideas at meetings and on the web.	GPO	GPO should set up such a venue in person and put up a dedicated website for depository libraries to exchange those ideas

Name	Institution	Email Address
Judy Andrews	Portland State University	andrewsj@pdx.edu
Joe Paskoski	GPO	jpaskoski@gpo.gov
Jan Swanbeck	University of Florida	janswan1@ufl.edu
Barbie Selby	University of Virginia	bselby@virginia.edu
Steve Beleu	Oklahoma Dept of Libraries	sbeleu@oltn.odl.state.ok.us
John Walters	Utah State University	johwal@ngw.lib.usu.edu
Pat Ragains	University of Nevada, Reno	regains@unr.edu
Mike Ragen	Illinois State Library	mragen@ilsos.net

### **Breakout Session Notes:**

**Date**: 10/15/2004 **Start Time**: 1:30 p.m. **End Time**: 3:00 p.m.

Topic: Future of Regional Libraries: Best Practices

Presenter: Geoffrey Swindells, University of Missouri, Columbia

Table Captain:Tim ByrneRecorder:Michele Worthington

### **Consensus:**

None

Action Items	Assigned Responsibility	Comments
Need some time for information sharing at Regional meeting		
Expand Regional web pages		Be more proactive Add more content
Better use of Regional – to share best practices		
Build more multi-state cooperation		
Expand communication if we want to learn from each other		
Share one's experiments or suggestions		

Name	Institution	Email Address
Tim Byrne	University of Colorado	tim.byrne@colorado.edu
Michele Worthington	GPO	mworthington@gpo.gov
Susan C. Field	University of Georgia	scfield@uga.edu
Laura Saurs	Newark Public Library	lsaurs@npl.org
Mary Brewer	Arkansas State Library	mbrewer@asl.lib.ar.us
David Cismowski	California State Library	dcismowski@library.ca.gov
Julie Wallace	University of Minnesota	j-wall@umn.edu

#### **Breakout Session Notes:**

Topic: Future of Regional Libraries: Best Practices

Presenter: Geoffrey Swindells, University of Missouri, Columbia

 Table Captain:
 Laurie Canepa
 Recorder:
 Cindy Etkin

#### **Consensus:**

We don't yet have an effective model for best practices for reference service in an electronic environment. Best reference service can only be given in person with patron present. We do the best we can with e-mail chat, but see potential for wasted time and resources. There is a need to figure out how to transfer human skills to electronic environment.

Action Items	Assigned Responsibility	Comments
Develop holographic reference capabilities		
Continue exploring possibilities and improvements in a changing world.		We don't have an effective model yet in an electronic environment.

Name	Institution	Email Address
Laurie Canepa	State Library of New Mexico	laurie@stlib.state.nm.us
Cindy Etkin	GPO	cetkin@gpo.gov
John Phillips	Oklahoma State University	bart@okstate.edu
Audrey L. Hall	State Library of Ohio	ahall@sloma.state.oh.us
Saundra Williams	University of Memphis	swilliam@memphis.edu
Doug Conrads	Indiana State Library	dconrads@statelib.lib.in.us
Charles Bernholz	University of Nebraska, Lincoln	cbernholz2@unl.edu
Beth L. Rowe	UNC - Chapel Hill	rowe@refstaff.lib.unc.edu
John Stevenson	University Delaware	varken@udel.edu

### **Breakout Session Notes:**

**Date**: 10/15/2004 **Start Time**: 1:30 p.m. **End Time**: 3:00 p.m.

Topic: Future of Regional Libraries: Best Practices

Presenter: Geoffrey Swindells, University of Missouri, Columbia

Table Captain:Jan ComfortRecorder:L. B. Hall

### **Consensus:**

As Geoff pointed out, there is no one best practice.

We need to be proactive in our future instead of being "the last one standing".

We need to make better use of:

- Regional Library
- Regional Website
- State Planning

Action Items	Assigned Responsibility	Comments
Ask GPO to sponsor/participate in a multi-region meeting		GPO could provide some training as well as some opportunities to schmooze

Name	Institution	Email Address
Jan Comfort	Clemson University	comforj@clemson.edu
Laurie Hall	GPO	lhall@gpo.gov
Susan Troyan	Texas State Library & Archives	stroyan@tsl.state.tx.us
Rob Jackson	Denver Public Library	rjackson@denver.lib.co.us
Ann Sanders	Library of Michigan	asanders@michigan.gov
Sandra McAninch	University of Kentucky	mcaninch@uky.edu
Dan Barkley	University of New Mexico	barkley@unm.edu
Gwen Sinclair	University of Hawaii, Manoa	gsinclai@hawaii.edu
Gil Baldwin	GPO	ebaldwin@gpo.gov

Topic: Future of Regional Libraries: Best Practices

Presenter: Geoffrey Swindells, University of Missouri, Columbia

 Table Captain:
 Maureen Olle

 Recorder:
 Robin Haun-Mohamed

Email Address: molle@lsu.edu Email Address: rhaun-mohamed@gpo.gov

#### **Consensus:**

Regionals need to share more information amongst ourselves.

In a supportive environment about our projects, practices and problems, Regionals could provide more training, outreach and implement new ways of getting community input.

Action Items	Assigned Responsibility	Comments
Further investigation of what a federated search is	GPO	Is GPO going to have it available through the ILS?
Host more Regional meetings	GPO	This may be accomplished in person, virtually, geographic meetings with one meeting a year being face-to-face.
Have a contact person at GPO for depository libraries		

Name	Institution	Email Address
Maureen Olle	Louisiana State University	molle@lsu.edu
Robin Haun-Mohamed	GPO	rhaun-mohamed@gpo.gov
Ruth Cochran	University of Idaho	ruth@uidaho.edu
Janet Fisher	Arizona State Library & Archive	jfisher@lib.az.us
Donna Vavrek	Louisiana Tech University	dvavrek@library.latech.edu
Lucy Farrow	Auburn University at Montgomery	lfarrow1@mail.aum.edu

#### **Breakout Session Notes:**

Topic: Future of Regional Libraries: Best Practices

Presenter: Geoffrey Swindells, University of Missouri, Columbia

 Table Captain:
 Tom Rohrig
 Recorder:
 John Dowgiallo

Email Address: jdowgiallo@gpo.gov

#### **Consensus:**

There has to be several types of best practices (i.e. library type, geographic size, population served, number of Selectives, etc.). There needs to be a mechanism to determine the needs of users and to assess if the needs of users are being met. These best practices need to be integrated into your institution's best practices.

Action Items	Assigned Responsibility	Comments
Determine how to define best practices as related to all Regionals and then customize to library types and to individual Regionals		

Name	Institution	Email Address
Tom Rohrig	Texas Tech University	tom.rohrig@ttu.edu
John Dowgiallo	GPO	jdowgiallo@gpo.gov
Linda Johnson	University of New Hampshire	linda@cisunix.unh.edu
Deborah Mongeau	University of Rhode Island	dmongeau@uri.edu
Herrick Heitman	Washington State Library	hheitman@secstate.wa.gov
Beth Harper	University of Wisconsin	hharper@library.wisc.edu
Cathy Sagendorf	New York State Library	csagendo@mail.nysed.gov
Jennie Burroughs	University of Montana	jennie.burroughs@umontana.edu

### **Breakout Session Notes:**

Topic: Future of Regional Libraries: Best Practices

Presenter: Geoffrey Swindells, University of Missouri, Columbia

Table Captain:Kathy HaleRecorder:Kathy Brazee

Email Address: khale@state.pa.us Email Address: kbrazee@gpo.gov

#### **Consensus:**

What do we mean by best practices? Is it policy and guidelines or standards and projects that we have done successfully that fit some libraries that can be adapted to the government documents community as a whole?

Action Items	Assigned Responsibility	Comments
Utilize the FDLP conference as a venue for communication and preparation for establishing Regionals to share best practices		

Name	Institution	Email Address
Kathy Hale	State Library of Pennsylvania	khale@state.pa.us
Kathy Brazee	GPO	kbrazee@gpo.gov
Daniel Cornwall	Alaska State Library	dan_cornwall@eed.state.ak.us
Nancy Peluso	Connecticut State Library	npeluso@cslib.org
Bill Sudduth	University of South Carolina	sudduthw@gwm.sc.edu

## **Breakout Session Notes:**

**Topic**: Future of Regional Libraries: Best Practices

Presenter: Geoffrey Swindells, University of Missouri, Columbia

Table Captain:Marianne RyanRecorder:Suzanne Ebanues

### **Consensus:**

Best practices in the electronic environment should begin with GPO proactively developing standards, in collaboration with Regionals depositories that possess depth and breath of knowledge and expertise.

Action Items	Assigned Responsibility	Comments
Convene a representative working group of Regional libraries to formalize standards for best practices in the preservation and digitization of legacy materials		

Name	Institution	Email Address
Marianne Ryan	University of Maryland	mr190@umail.umd.edu
Suzanne Ebanues	GPO	sebanues@gpo.gov
Sandra Groleau	Bates College Library	sgroleau@bates.edu
Jeff Bullington	University of Kansas	jsbullington@ku.edu
Laura S. Harper	University of Mississippi	lgharper@olemiss.edu
Marianne Mason	University of Iowa	marianne-mason@uiowa.edu

Topic: Future of Regional Libraries: A Plan for a Regional Performance Survey Tool

**Presenter**: Tim Byrne, University of Colorado, Boulder

 Table Captain: Judy Andrews
 Recorder: Janet Scheitle

Email Address: andrewsj@pdx.edu Email Address: jscheitle@gpo.gov

### **Consensus:**

We want to thank Tim for all his hard work and believe he has given us a good starting point.

The survey is a good idea, which, if properly designed and implemented, will benefit Regionals, Selectives, and provide administrators with a better understanding of the depository responsibilities. The survey will benefit from more open-ended questions to provide new and unexpected information.

Action Items	Assigned Responsibility	Comments
Hire an independent survey analyst to assist in designing the Regional Performance Survey and provide a template for implementing the survey	GPO	
Hire an external survey designer to design a non-leading survey	GPO	

Name	Institution	Email Address
Judy Andrews	Portland State University	andrewsj@pdx.edu
Janet Scheitle	GPO	jscheitle@gpo.gov
Charles Bernholz	University of Nebraska	cbernholz2@unl.edu
Marianne Mason	University of Iowa	marianne-mason@uiowa.edu
Deborah Mongeau	University of Rhode Island	dmongeau@uri.edu
Beth Rowe	UNC – Chapel Hill	rowe@refstaff.lib.unc.edu
Jennie Burroughs	University of Montana	jennie.burroughs@umontana.edu

## **Breakout Session Notes:**

**Date**: 10/15/2004 **Start Time**: 3:30 p.m. **End Time**: 5:00 p.m.

Topic: Future of Regional Libraries: A Plan for a Regional Performance Survey Tool

**Presenter**: Tim Byrne, University of Colorado, Boulder

 Table Captain: Marianne Ryan
 Recorder: Cindy Etkin

### **Consensus:**

The first line of defense is that a Regional should maintain good and continuous communication of their Selective community. An evaluation tool could be useful for feedback and better understanding of expectations, although it may be difficult to gather appropriate or helpful data unless open-ended questions are included.

Action Items	Assigned Responsibility	Comments
Survey Selectives or conduct a follow-up survey	Regionals	Any evaluation tool should go in both directions.

Name	Institution	Email Address
Marianne Ryan	University of Maryland	mr190@umail.umd.edu
Cindy Etkin	GPO	cetkin@gpo.gov
Gwen Sinclair	University of Hawaii – Manoa	gsinclai@hawaii.edu
Sandra Groleau	Bates College Library	sgroleau@bates.edu
Christine Chang	West Virginia University	cchang@wvu.edu
Linda Johnson	University of New Hampshire	linda@cisunix.unh.edu
Audrey L. Hall	State Library of Ohio	all@sloma.state.oh.us
Rob Jackson	Denver Public Library	rjackson@denver.lib.co.us
John Walters	Utah State University	johwal@ngw.lib.usu.edu

Topic: Future of Regional Libraries: A Plan for a Regional Performance Survey Tool

**Presenter**: Tim Byrne, University of Colorado, Boulder

 Table Captain:
 Laurie Canepa

 Recorder:
 Laurie Hall

#### **Consensus:**

It was not unanimous whether or not this tool as proposed would give us the feedback we seek. Not interested in how we are doing, but what Selectives need from us. Need to develop a tool to identify these needs. Need something to help us talk to directors so that they understand what resources are needed and why. Need to consider the possibility of attaching survey to the biennial survey.

Action Items	Assigned Responsibility	Comments
Involve Selectives in the design of survey tool, cross-section of Selectives involved		
Focus group this week for those who want to move this further, get this survey worked on until the spring		
Use the biennial survey as the mechanism		

Name	Institution	Email Address
Laurie Canepa	New Mexico State Library	laurie@stlib.state.nm.us
Laurie Hall	GPO	lhall@gpo.gov
Barbie Selby	University of Virginia	bselby@virginia.edu
Herrick Heitman	Washington State Library	hheitman@secstate.wa.gov
David Cismowski	California State Library	dcismowski@library.ca.gov
Julie Wallace	University of Minnesota	j-wall@umn.edu
Steve Beleu	Oklahoma Dept. of Libraries	sbeleu@oltn.odl.state.ok.us

### **Breakout Session Notes:**

**Date**: 10/15/2004 **Start Time**: 3:30 p.m. **End Time**: 5:00 p.m.

Topic: Future of Regional Libraries: A Plan for a Regional Performance Survey Tool

**Presenter**: Tim Byrne, University of Colorado, Boulder

Table Captain:Jan ComfortRecorder:Robin Haun-Mohamed

### **Consensus:**

We would find the survey most useful if it was referenced as a needs assessment. Part of a broader assessment plan – including using biennial survey data. We would also like to put this off for a little while to allow us time for remediation.

Action Items	Assigned Responsibility	Comments
Administered by Regionals for Regionals		

Name	Institution	Email Address
Jan Comfort	Clemson University	comforj@clemson.edu
Robin Haun-Mohamed	GPO	rhaun-mohamed@gpo.gov
Lucy Farrow	Auburn University, Montgomery	lfarrow1@mail.aum.edu
Pat Ragains	University of Nevada, Reno	ragains@unr.edu
Donna Vavrek	Louisiana Tech University	dvavrek@latech.edu
Jan Swanbeck	University of Florida	janswan1@ufl.edu
Dan Barkley	University of New Mexico	barkley@unm.edu
Laura G. Harper	University of Mississippi	lgharper@olemiss.edu

Topic: Future of Regional Libraries: A Plan for a Regional Performance Survey Tool

**Presenter**: Tim Byrne, University of Colorado, Boulder

Table Captain:Maureen OlleRecorder:John Dowgiallo

Email Address: molle@lsu.edu Email Address: jdowgiallo@gpo.gov

### **Consensus:**

We think this is a useful tool that will show the Regionals our strengths and weaknesses. It will also tell us what services Selectives really need from us as well as inform Selectives of the service we offer.

Action Items	Assigned Responsibility	Comments
Series of questions to Regionals for those states with shared or dual Regionals to show different service levels (strengths and weaknesses)		
Separate questionnaire for shared and dual Regionals		

Name	Institution	Email Address
Maureen Olle	Louisiana State University	molle@lsu.edu
John Dowgiallo	GPO	jdowgiallo@gpo.gov
Beth Harper	University of Wisconsin	bharper@library.wisc.edu
Saundra Williams	University of Memphis	swilliam@memphis.edu
Ann Sanders	Library of Michigan	asanders@michigan.gov
John Phillips	Oklahoma State University	bart@okstate.edu

## **Breakout Session Notes:**

Topic: Future of Regional Libraries: A Plan for a Regional Performance Survey Tool

**Presenter**: Tim Byrne, University of Colorado, Boulder

 Table Captain:
 Tom Rohrig
 Recorder:
 Kathy Brazee

### **Consensus:**

This is a useful and appropriate tool to survey the Selectives about the quality, value and importance of Regional depository services. We recommend that the results be sent directly to the Regional librarian, not the library administration.

Action Items	Assigned Responsibility	Comments
Ask GPO to work with REGIL to implement the survey		

Name	Institution	Email Address
Tom Rohrig	Texas Tech University	tom.rohrig@ttu.edu
Kathy Brazee	GPO	kbrazee@gpo.gov
Susan Troyan	Texas State Library	stroyan@tsl.state.tx.us
Gil Baldwin	GPO National Bibliography	ebaldwin@gpo.gov
Nancy Peluso	Connecticut State Library	npeluso@cslib.org
Sandra McAninch	University of Kentucky	mcaninch@uky.edu
Cathy Sagendorf	New York State Library	csagendo@mail.nysed.gov

### **Breakout Session Notes:**

Topic: Future of Regional Libraries: A Plan for a Regional Performance Survey Tool

**Presenter**: Tim Byrne, University of Colorado, Boulder

Table Captain:Kathy HaleRecorder:Suzanne Ebanues

Email Address: khale@state.pa.us Email Address: sebanues@gpo.gov

### **Consensus:**

The survey would be a really good instrument for assessing the perception and expectation that the Selectives have of their Regionals. There would be a need to have more open-ended comments at the end of the question.

Action Items	Assigned Responsibility	Comments
Training & Development		Use as a tool to develop training for the Regionals
Good feedback to library schools and libraries education association		

Name	Institution	Email Address
Kathy Hale	State Library of Pennsylvania	khale@state.pa.us
Suzanne Ebanues	GPO	sebanues@gpo.gov
Ruth Cochran	University of Idaho	ruth@uidaho.edu
Jeff Bullington	University of Kansas	jsbullington@ku.edu
Laura Saurs	Newark Public Library	lsaurs@npl.org
Mike Ragen	Illinois State Library	mragen@ilsos.net

**Date**: 10/15/2004 **Start Time**: 3:30 p.m. **End Time**: 5:00 p.m.

Topic: Future of Regional Libraries: A Plan for a Regional Performance Survey Tool

**Presenter**: Tim Byrne, University of Colorado, Boulder

 Table Captain:
 Geoff Swindells
 Recorder:
 Joe Paskoski

### **Consensus:**

The consensus is a strong support for using this instrument; however, we would like to see some changes. We would like to include a narrative section that allows Selectives to expand on the ratings. We would also like to include questions that try to elicit feedback on practices and services that go beyond the requirement outlined in the Title 44, The Instructions and Guidelines. We would also like to see questions included that measure the value of Regional services to the Selectives and that allow Selectives to suggest ways to increase that value.

If implemented we would also like to make sure that clear timelines are established for completion and reporting back and that these are widely publicized.

Action Items	Assigned Responsibility	Comments
We suggest that GPO endorse the concept behind this instrument and work with Regionals to further development and implementation.		

Name	Institution	Email Address
Geoff Swindells	University of Missouri	swindellsg@missouri.edu
Joe Paskoski	GPO	jpaskoski@gpo.gov
Frank D'Andraia	University of Montana	frank.dandraia@umontana.edu
Janet Fisher	Arizona State Library & Archives	jfisher@lib.az.us
Mary Brewer	Arkansas State Library	mbrewer@asl.lib.ar.us
Daniel Cornwall	Alaska State Library	dan_cornwall@eed.state.ak.us
Doug Conrads	Indiana State Library	dconrads@statelib.lib.in.us

**Topic**: Relinquishing Regional Status

Presenter: John Phillips, Oklahoma Sate University

 Table Captain:
 Judy Andrews
 Recorder:
 Robin Haun-Mohamed

Email Address: andrewsj@pdx.edu Email Address: rhaun-mohamed@gpo.gov

### **Consensus:**

Relinquishing Regional status starts with conversations between all the stakeholders in the region.

This would include items such as:

- Staying in the program as a Selective
- Who may get the collection
- Who may take on the Regional responsibilities.

Following these discussions an MOU will be written to codify the details, which will be signed by the head of the Regionals institution and GPO. This MOU will start a 2-year clock with possibility of retaining Regional status (Ann Sanders comment: It takes 6 years for a Selective to inventory and withdraw.).

Other discussion points included changes that may occur due to online access to legacy collections.

Action Items	Assigned Responsibility	Comments
Develop a list of pre-MOU activities to be done when thinking of dropping Regional status.	Regional librarians & GPO	This will be review in 5 years to incorporate changes in FDLP.

Name	Institution	Email Address
Judy Andrews	Portland State University	andrewsj@pdx.edu
Robin Haun-Mohamed	GPO	rhaun-mohamed@gpo.gov
Deborah Mongeau	University of Rhode Island	dmongeau@uri.edu
Davis Cismowski	California State Library	dcismowski@library.ca.gov
Linda Johnson	University of New Hampshire	linda@cisunix.unh.edu
Rob Jackson	Denver Public Library	rjackson@denver.lib.co.us
Donna Vavrek	Louisiana Tech University	dvavrek@latech.edu
John Stevenson	University of Delaware	varken@udel.edu

**Topic**: Relinquishing Regional Status

Presenter: John Phillips, Oklahoma Sate University

 Table Captain:
 Tim Byrne
 Recorder:
 Cindy Etkin

#### **Consensus:**

When a library decides to drop Regional status, we feel strongly that there should be at least two years notice. We encourage wide notification to other Selectives, library board/university administration, state library, Congress and delegations with extensive discussion of the impacts in the state or region. The Regional community should also be notified.

Recognizing that, in the current economy, it is much less likely that another library might take on Regional status only for the good of the state, the budgetary implications of getting a new Regional should be included in any discussion and planning, which could include a state appropriation to pay to the new Regional.

Action Items	Assigned Responsibility	Comments
Find backups waiting in the wings to be the next Regional	GPO	
Develop chart of Regional/ shared Regional/ Regional of 2 states, etc.		In order to determine who would be affected by Regional status relinquished.
Work with Regionals to develop contingency plans for each state		This should include:  A chart indicating who would be affected by the changes in Regional status and the impact on the institutions and those they serve (long & short term)  Librarians retiring – those libraries in jeopardy

Name	Institution	Email Address
Tim Byrne	University of Colorado	tim.byrne@colorado.edu
Lucy Farrow	Auburn University at Montgomery	lfarrow1@mail.aum.edu
Sandra McAninch	University of Kentucky	mcaninch@uky.edu
Doug Conrads	Indiana State Library	dconrads@statelib.lib.in.us
Audrey L. Hall	State Library of Ohio	ahall@sloma.state.oh.us
Mary Brewer	Arkansas State Library	mbrewer@asl.lib.ar.us

## **Breakout Session Notes:**

**Topic**: Relinquishing Regional Status

Presenter: John Phillips, Oklahoma Sate University

Table Captain:Laurie CanepaRecorder:Kathy Brazee

### **Consensus:**

It is in the best interest of the state for the collection to stay in the state or region. The mechanism for this will vary from state to state.

There has to be a mechanism in place to prevent a Regional from withdrawing without considering the implications for the rest of the state.

The following groups or institutions should be notified:

- Congressional delegation
- State librarian / Governor
- Selectives
- Other Regionals in the area

There should also be a need to consider geographical guidelines for collection retention. Another library in the state or region should be given the option to retain the collection.

Action Items	Assigned Responsibility	Comments
A task force of regional librarians should develop a set of		Guidelines should consider:
guidelines for Regionals who are considering relinquishing status		<ul> <li>Timeframe (recommend at least 2 years)</li> </ul>
		<ul> <li>Regional collection retention (maintaining collection in geographic area)</li> </ul>
		<ul> <li>Institutions/agencies to be notified</li> </ul>
		<ul> <li>Distribution of statewide responsibilities</li> </ul>
		<ul> <li>Regionals should be involved in any changes to the regional system or revision of these guidelines.</li> </ul>

Name	Institution	Email Address
Laurie Canepa	New Mexico State Library	laurie@stlib.state.nm.us
Kathy Brazee	GPO	kbrazee@gpo.gov
John Phillips	Oklahoma State University	bart@okstate.edu
Dan Barkley	University of New Mexico	barkley@unm.edu
Beth L. Rowe	UNC – Chapel Hill	rowe@refstaff.lib.unc.edu
Ann Sanders	Library of Michigan	asanders@michigan.gov
Roth Cochran	University of Idaho	ruth@uidaho.edu

## **Breakout Session Notes:**

**Topic**: Relinquishing Regional Status

Presenter: John Phillips, Oklahoma Sate University

Table Captain:Jan ComfortRecorder:Betty Jones

### **Consensus:**

None

Action Items	Assigned Responsibility	Comments
NONE		

Name	Institution	Email Address
Jan Comfort	Clemson University	comforj@clemson.edu
Betty Jones	GPO	bjones@gpo.gov
Sandra Groleau	Bates college Library	sgroleau@bates.edu
Marianne Mason	University of Iowa	marianne-mason@uiowa.edu
Steve Beleu	Oklahoma Dept. of Libraries	sbeleu@oltn.odl.state.ok.us
Mike Ragen	Illinois State Library	mragen@ilsos.net

**Topic**: Relinquishing Regional Status

Presenter: John Phillips, Oklahoma Sate University

Table Captain:Maureen OlleRecorder:Ric Davis

Email Address: molle@lsu.edu Email Address: rdavis@gpo.gov

### **Consensus:**

There should be recognition that the FDLP is a system composed of lots of different partners, GPO, the libraries and their sponsoring institutions.

GPO should be a strong active partner to ensure the integrity of the collaborative nature of this program.

Action Items	Assigned Responsibility	Comments
Clarify its intentions with the regional depository system	GPO	
Have a contact person for FDLP	GPO	
Mechanism whereby Regionals are required to inform GPO if evaluating regional status		GPO should be an active partner in this process and the collections
Regionals should look at what they are and what they will do in the future	Regionals	
On-going communications with institutions on all levels		
GPO should assist those Regionals relinquishing status and bolster those remaining		

Name	Institution	Email Address
Maureen Olle	Louisiana State University	molle@lsu.edu
Ric Davis	GPO	rdavis@gpo.gov
Charles D. Bernholz	University of Nebraska, Lincoln	cbernholz2@unl.edu
Marianne Ryan	University of Maryland	mr190@umail.umd.edu
Jeff Bullington	University of Kansas	jsbullington@ku.edu
Janet Fisher	Arizona State Library @ Archives	jfisher@lib.az.us
Pat Ragains	University of Nevada, Reno	regains@unr.edu

## **Breakout Session Notes:**

**Topic**: Relinquishing Regional Status

Presenter: John Phillips, Oklahoma Sate University

### **Consensus:**

Definitely need guidelines

Notification of all stakeholders

- a. Boards/Administration
- b. Congress persons
- c. Affected Selectives
- d. Affected Regionals / state libraries
- e. Users
- Need to identify all steps
- Very thorny issue
- Regional should notify GPO as soon as possible if this is a possibility.

Action Items	Assigned Responsibility	Comments
Develop guidelines that spell out process in detail taking into consideration different situations		

Name	Institution	Email Address
Tom Rohrig	Texas Tech University	tom.rohrig@ttu.edu
Gil Baldwin	GPO	ebaldwin@gpo.gov
Laura Saurs	Newark Public Library	lsaurs@npl.org
Susan Troyan	Texas State Library	stroyan@tsl.state.tx.us
Beth Harper	University of Wisconsin, Madison	bharper@library.wisc.edu
Jennie Burroughs	University of Montana	jennie.burroughs@umontana.edu
Saundra Williams	University of Memphis	swilliam@memphis.edu
Susan Field	University of Georgia	scfield@uga.edu
Cathy Sagendorf	New York State Library	csagendo@mail.nysed.gov

**Topic**: Relinquishing Regional Status

Presenter: John Phillips, Oklahoma Sate University

 Table Captain:
 Kathy Hale
 Recorder:
 Gretchen Schlag

Email Address: khale@state.pa.us Email Address: gschlag@gpo.gov

#### **Consensus:**

A plan prepared by a committee of Regionals and GPO staff to detail the options and procedures when the institution relinquishes its regional status. There are two scenarios of a Regional not keeping the collection or the Regional cannot do the services but wants to remain a Selective. We feel the latter scenario would be a more likely option.

Action Items	Assigned Responsibility	Comments
Contact person to discuss sensitive issues on dropping	GPO	
Work on a procedure to make the selection process easier	Regionals	Especially when there is no Regional or in relinquishing regional status

Name	Institution	Email Address
Kathy Hale	State Library of Pennsylvania	khale@state.pa.us
Gretchen Schlag	GPO	gschlag@gpo.gov
Jan Swanbeck	University of Florida	janswan@mail.uflib.ufl.edu
Nancy Peluso	Connecticut State Library	npeluso@cslib.org
Julia Wallace	University of Minnesota	j-wall@umn.edu
Gil Baldwin	GPO	ebaldwin@gpo.gov
Laura Harper	University of Mississippi	lgharper@olemiss.edu

**Topic**: Relinquishing Regional Status

Presenter: John Phillips, Oklahoma Sate University

 Table Captain:
 Geoff Swindells
 Recorder:
 Janet Scheitle

#### **Consensus:**

The table census is that GPO, upon notification that a Regional wishes to drop status, should first contact high level administrators at the Regional's institution or agency as well as the library authority for the state, the state's congressional delegates and all the Selectives in that state. GPO should then convene a working group to guide the process. This group should include, at minimum, a contact person for GPO, a regional library from a neighbor, state and one or more Selectives in that state.

Action Items	Assigned Responsibility	Comments
Convene a working group of regional librarians to formalize procedures and timeframes for regionals dropping status		Bill Sudduth should be on it.

Name	Institution	Email Address
Geoff Swindells	University of Missouri	swindellsg@missouri.edu
Janet Scheitle	GPO	jscheitle@gpo.gov
Bill Sudduth	University of South Carolina	sudduthw@gwm.sc.edu
John Walters	Utah State University	johwal@ngw.lib.usu.edu
Herrick Heitman	Washington State Library	hheitman@secstate.wa.gov
Gwen Sinclair	University of Hawaii – Manoa	gsinclai@hawaii.edu
Barbie Selby	University of Virginia	bselby@virginia.edu
Daniel Cornwall	Alaska State Library	dan_cornwall@eed.state.ak.us
Christine Chang	West Virginia University	cchang@wvu.edu

### **Breakout Session Notes:**

**Topic**: Consultant Initiative /Training and Development

Presenter: Larry Blevins, Director, Office of Education and Development, GPO

 Table Captain:
 Judy Andrews
 Recorder:
 Robin Haun-Mohamed

Email Address: andrewsj@pdx.edu Email Address: rhaun-mohamed@gpo.gov

### **Consensus:**

Base measure of success is a stronger depository system including Selectives, Regionals and the broader user community as well as a dynamic partnership with GPO. Actual assessment will vary depending on the proposals by the individual projects.

Action Items	Assigned Responsibility	Comments
Consultants should be required to have depository library experience.		

Name	Institution	Email Address
Judy Andrews	Portland State University	andrewsj@pdx.edu
Robin Haun-Mohamed	GPO	rhaun-mohamed@gpo.gov
Marianne Ryan	University of Maryland	mr190@umail.umd.edu
Sandra McAninch	University of Kentucky	mcaninch@uky.edu
Beth Harper	University of Wisconsin	bharper@library.wisc.edu
Jeff Bullington	University of Kansas	jsbullington@ku.edu
Daniel Cornwall	Alaska State Library	dan-cornwall@eed.state.ak.us

### **Breakout Session Notes:**

**Topic**: Consultant Initiative /Training and Development

Presenter: Larry Blevins, Director, Office of Education and Development, GPO

Table Captain:Tim ByrneRecorder:Cindy Etkin

### **Consensus:**

What success looks like:

The consultant program will be successful if the program helps move Regionals from being collection based to being service based. Additionally, success will be measured by how well we can sustain the gains made, once the consultant position ends.

Action Items	Assigned Responsibility	Comments
All the host institution to bring in a consultant at the highest level & experience possible	GPO	

Name	Institution	Email Address
Tim Byrne	University of Colorado	tim.byrne@colorado.edu
Cindy Etkin	GPO	cetkin@gpo.gov
Susan Troyan	Texas State Library	stroyan@tsl.state.tx.us
Janet Fisher	Arizona State Library & Archives	jfisher@lib.az.us
Pat Ragains	University of Nevada, Reno	regains@unv.edu
Otis Sistruck	University of ?????	green?????
Bill Sudduth	University of South Carolina	Sudduthw@gwm.sc.edu

### **Breakout Session Notes:**

**Topic**: Consultant Initiative /Training and Development

Presenter: Larry Blevins, Director, Office of Education and Development, GPO

Table Captain:Laurie CanepaRecorder:Kathy Brazee

### **Consensus:**

Success would involve hiring consultants who are professional librarians experienced in government information and library operations. We don't want to train the consultant. Consultants would bring libraries together in a collaborative way – promote idea sharing, bring "isolated" libraries into the communications network and assist with turnover and retirements in region.

Priority would be given to states and regions with highest need (i.e. fewest Regionals, highest "stress", has evaluation and report mechanism, as in libraries with consultants report back to the regional community providing a mechanism to tune up.) Regionals and Selectives have a mechanism for informing GPO of specialized regional needs.

Action Items	Assigned Responsibility	Comments
Work towards hiring experienced consultants	GPO	

Name	Institution	Email Address
Laurie Canepa	New Mexico State Library	laurie@stlib.state.nm.us
Kathy Brazee	GPO	kbrazee@gpo.gov
Saundra Williams	University of Memphis	swilliam@memphis.edu
Lucy Farrow	Auburn University, Montgomery	lfarrow1@mail.aum.edu
Susan Field	University of Georgia	scfield@uga.edu
Charles Bernholz	University of Nebraska, Lincoln	cbernholz2@unl.edu
Julie Wallace	University of Minnesota	j-wall@umn.edu

## **Breakout Session Notes:**

**Topic**: Consultant Initiative /Training and Development

Presenter: Larry Blevins, Director, Office of Education and Development, GPO

Table Captain:Jan ComfortRecorder:Betty M. Jones

## **Consensus:**

None

Action Items	Assigned Responsibility	Comments
Use experienced GPO employees		
Make better use of knowledgeable people		

Name	Institution	Email Address
Jan Comfort	Clemson University	comforj@clemson.edu
Betty Jones	GPO	bjones@gpo.gov
Beth L. Rowe	UNC – Chapel Hill	rowe@ref.staff.lib.unc.edu
John Phillips	Oklahoma State University	bart@okstate.edu
Linda Johnson	University of New Hampshire	linda@cisunix.unh.edu
John Stevenson	University of Delaware	varken@udel.edu
Mary Brewer	Arkansas State Library	mbrewer@asl.lib.ar.us

### **Breakout Session Notes:**

**Topic**: Consultant Initiative /Training and Development

Presenter: Larry Blevins, Director, Office of Education and Development, GPO

 Table Captain:
 Maureen Olle
 Recorder:
 Ric Davis

Email Address: molle@lsu.edu Email Address: rdavis@gpo.gov

### **Consensus:**

We are generally supportive of the concept provided that GPO ensures that full support of the program in a more permanent structure. Success will mean greater confidence among depository personnel in terms of their competence and that they are following best practices resulting in better service and use of government information in all forms by the general public.

Action Items	Assigned Responsibility	Comments
Spell out in detail the qualification of consultants and play an active role in the hiring process	GPO	Salaries and benefits should be commensurate with highly qualified potentially long-term candidates.
Flesh out details of how the consultants will be implementing compliance issues and share with all depository partners	GPO	

Name	Institution	Email Address
Maureen Olle	Louisiana State University	molle@lsu.edu
Ric Davis	GPO	rdavis@gpo.gov
David Cismowski	California State Library	dcismowski@library.ca.gov
Mike Ragen	Illinois State Library	mragen@ilsos.net
Deborah Mongeau	University of Rhode Island	dmongeau@uri.edu
Laura Harper	University of Mississippi	lgharper@olemiss.edu
John Walters	Utah State University	johwar@ngw.lib.usu.edu

## **Breakout Session Notes:**

**Topic**: Consultant Initiative /Training and Development

Presenter: Larry Blevins, Director, Office of Education and Development, GPO

### **Consensus:**

Success would be having:

Permanent highest level GPO employee, based in D.C./Regional with problem, in-service training, with refresher training, are the ????? librarian, having on ????? on the hiring. This is based on inspector model. This will give ????? a special ????? ????? with GPO.

This success also means identifying our concerns:

- 1-2 yeartime frame to look
- Pay is going to be too low
- ????? need to be straightened
- ????? more than going leve, expertise

GPO should provide centralized training, in-service training, on-going refresher training.

Action Items	Assigned Responsibility	Comments
Develop a program that meets our criteria	GPO	

Name	Institution	Email Address
Tom Rohrig	Texas Tech University	tom.rohrig@ttu.edu
Gil Baldwin	GPO	gbaldwin@gpo.gov
Donna Vavrek	Louisiana Tech University	dvavrek@library.latech.edu
Gwen Sinclair	University of Hawaii, Manoa	gsinclai@hawaii.edu
Barbie Selby	University of Virginia	bselby@virginia.edu
Nancy Peluso	Connecticut State Library	npeluso@cslib.org
Herrick Heitman	Washington State Library	hheitman@secstate.wa.gov
Laura Saurs	Newark Public Library	lsaurs@npl.org

### **Breakout Session Notes:**

**Topic**: Consultant Initiative /Training and Development

Presenter: Larry Blevins, Director, Office of Education and Development, GPO

 Table Captain:
 Kathy Hale
 Recorder:
 Gretchen Schlag

Email Address: khale@state.pa.us Email Address: gschlag@gpo.gov

### **Consensus:**

We still leave a lot of questions about this program and want better clarification of what these people will be. We question the equitable placement and supervision of the consultant. We see this as an augmentation of the Regional who is separated from Selectives geographically. An outcome would be a more actively engaged documents community to allow Selectives to work with their constituencies. This would provide a more consistent level of training and awareness.

Action Items	Assigned Responsibility	Comments
Need GPO to better outline what is expected in the proposal	GPO	
More actively engaged community to allow Selective to better serve the community		
Need to take a more active role in dividing up the country	GPO	

Name	Institution	Email Address
Kathy Hale	State Library of Pennsylvania	khale@state.pa.us
Gretchen Schlag	GPO	gschlag@gpo.gov
Marianne Mason	University of Iowa	Marianne-mason@uiowa.edu
Christine Chang	West Virginia University	cchang@wvu.edu
Cathy Sagendorf	New York State Library	csagendo@mail.nysed.gov
Audrey L. Hall	State Library of Ohio	ahall@sloma.state.oh.us
Rob Jackson	Denver Public Library	rjackson@denver.lib.co.us
Doug Conrads	Indiana State Library	dconrads@statelib.lib.in.us

## **Breakout Session Notes:**

**Topic**: Consultant Initiative /Training and Development

Presenter: Larry Blevins, Director, Office of Education and Development, GPO

 Table Captain:
 Geoff Swindells
 Recorder:
 Janet Scheitle

### **Consensus:**

A successful consultants program would consist of project-focused (as opposed to generic) consultancies with clearly defined goals and an appropriate timeframe adequate to complete project tasks. Consultants bring specific skill sets and expertise to these projects. There must be a clearly defined chain of command understood by all parties. A successful consultancy would be one that can overcome what we believe are serious roadblocks to recruitment, given our understanding of correct salaries and benefits.

Action Items	Assigned Responsibility	Comments
Make regular progress reports to the depository community on the progress of all consultancies in progress and should develop measures for the evaluation of project success	GPO	

Name	Institution	Email Address
Geoff Swindells	University of Missouri	swindellsg@missouri.edu
Janet Scheitle	GPO	jscheitle@gpo.gov
Roth Cochran	University of Idaho	ruth@uidaho.edu
Steve Beleu	Oklahoma Dept. of Libraries	sbeleu@oltn.odl.state.ok.us
Jennie Burroughs	University of Montana	jennie.burroughs@umontana.edu
Ann Sanders	Library of Michigan	asanders@michigan.gov
Jan Swanbeck	University of Florida	janswan@mail.uflib.ufl.edu

### **Breakout Session Notes:**

**Date**: 10/16/2004 **Start Time**: 1:30 p.m. **End Time**: 3:00 p.m.

**Topic**: Collection of Last Resort

Presenter: Janet Scheitle, Direct, Office of Library Program Planning, GPO

 Table Captain:
 Judy Andrews
 Recorder:
 Robin Haun-Mohamed

Email Address: andrewsj@pdx.edu Email Address: rhaun-mohamed@gpo.gov

### **Consensus:**

The concept of a national collection is a good idea. We like the hierarchy to share materials. The dark archives would address basic preservation needs; however, we are uneasy about the lack of statutory authority for the National Collection, funding for this initiative and the long-term preservation of digital materials.

We would like to re-affirm that there will <u>always</u> be a place and a need for tangible publications of government information.

Action Items	Assigned Responsibility	Comments
Seek statutory authority for the National Collection		

Name	Institution	Email Address
Judy Andrews	Portland State University	andrewsj@pdx.edu
Robin Haun-Mohamed	GPO	rhaun-mohamed@gpo.gov
Barbie Selby	University of Virginia	bselby@virginia.edu
Gwen Sinclair	University of Hawaii, Manoa	gsinclai@hawaii.edu
Susan Troyan	Texas State Library	stroyan@tsl.state.tx.us
Linda Johnson	University of New Hampshire	linda@cisunix.unh.edu
Janet Fisher	Arizona State Library & Archives	jfisher@lob.az.us
John Phillips	Oklahoma State University	bart@okstate.edu

## **Breakout Session Notes:**

**Topic**: Collection of Last Resort

Presenter: Janet Scheitle, Direct, Office of Library Program Planning, GPO

 Table Captain:
 Tim Byrne
 Recorder:
 Cindy Etkiin

### **Consensus:**

Of greatest importance are adequate redundancy and geographic dispersal. We have this now with FDLP for tangible products. Can we mirror this in the electronic environment?

Action Items	Assigned Responsibility	Comments
Take advantage of having an accessible or light archive at GPO which should also serve as a working collection for ongoing cataloging and classification activities	GPO	

Name	Institution	Email Address
Tim Byrne	University of Colorado	tim.byrne@colorado.edu
Cindy Etkin	GPO	cetkin@gpo.gov
David Cismowski	California State Library	dcismowski@library.ca.gov
Nancy Peluso	Connecticut State Library	npeluso@cslib.org
Daniel Cornwall	Alaska State Library	dan-cornwall@eed.state.ak.us

### **Breakout Session Notes:**

**Date**: 10/16/2004 **Start Time**: 1:30 p.m. **End Time**: 3:00 p.m.

**Topic**: Collection of Last Resort

Presenter: Janet Scheitle, Direct, Office of Library Program Planning, GPO

Table Captain:Laurie CanepaRecorder:Kathy Brazee

Email Address: laurie@stlib.state.nm.us Email Address: kbrazee@gpo.gov

### **Consensus:**

We support the concept of a collection of last resort. A system of dark and light archives would give Regionals some flexibility and reduce pressures related to space consumption and justification of maintenance and preservation of our administrations, allowing us to concentrate on the maintenance and preservation of collections that have direct relevance to our community's library missions.

One model for light archives would be to have several "complete" physical light archives (discrete collections in several locations). In addition, a physical collection dispersed regionally with holdings in one central location.

Concerns expressed about orphan documents, magnitude of coordination efforts, etc.

Action Items	<b>Assigned Responsibility</b>	Comments
Clarify legal issues regarding our ability to re-duplicate against copies held in other light and dark locations outside of regional library	GPO	

Name	Institution	Email Address
Laurie Canepa	New Mexico State Library	laurie@stlib.state.nm.us
Kathy Brazee	GPO	kbrazee@gpo.gov
Doug Conrads	Indiana State Library	dconrads@statelib.lib.in.us
Beth Harper	University of Wisconsin, Madison	bharper@library.wisc.edu
Marianne Ryan	University of Maryland	mr190@umail.umd.edu
Sandra McAninch	University of Kentucky	mcaninch@uky.edu
Jennie Burroughs	University of Montana	jennie.burroughs@umontana.edu

## **Breakout Session Notes:**

**Date**: 10/16/2004 **Start Time**: 1:30 p.m. **End Time**: 3:00 p.m.

Topic: Collection of Last Resort

Presenter: Janet Scheitle, Direct, Office of Library Program Planning, GPO

Table Captain:Jan ComfortRecorder:Betty M. Jones

### **Consensus:**

CLR would be focus of what's possible on short term (3 to 5 years). It is too late for complete collection.

Action Items	Assigned Responsibility	Comments
NONE		

Name	Institution	Email Address
Jan Comfort	Clemson University	comforj@clemson.edu
Betty Jones	GPO	bjones@gpo.gov
Susan Field	University of Georgia	scfield@uga.edu
Beth L. Rowe	UNC - Chapel Hill	rowe@refstaff.lib.unc.edu
Bill Sudduth	University of South Carolina	sudduthw@gwm.sc.edu
Saundra Williams	University of Memphis	swilliam@memphis.edu
Dan Barkley	University of New Mexico	barkley@unm.edu
Julie Wallace	University of Minnesota	j-wall@umn.edu

### **Breakout Session Notes:**

**Date**: 10/16/2004 **Start Time**: 1:30 p.m. **End Time**: 3:00 p.m.

**Topic**: Collection of Last Resort

Presenter: Janet Scheitle, Direct, Office of Library Program Planning, GPO

Table Captain:Maureen OlleRecorder:Ric Davis

Email Address: molle@lsu.edu Email Address: rdavis@gpo.gov

### **Consensus:**

The collection of last resort would provide a safety net for the FDLP and, if implemented properly, could provide better access for everyone. There are concerns about the governance structure for the dark archive of the West, how the collection would be assembled, both historically and digitally and quality control.

Our expectation is that quality control would ensure that complete copies are added to the collection.

Action Items	Assigned Responsibility	Comments
How would collection of last resort holdings be reflected in the National Bibliography and DCLS?		
More information on the West dark archive		central vs. distributed, governance structure, method of acquisition, quality control
Clarification of how CLR is related to light and dark archives		

Name	Institution	Email Address	
Maureen Olle	Louisiana State University	molle@lsu.edu	
Ric Davis	GPO	rdavis@gpo.gov	
Herrick Heitman	Washington State Library	hheitman@statelib.wa.gov	
Marianne Mason	University of Iowa	mariane-mason@uiowa.edu	
Pat Ragains	University of Nevada, Reno	regains@unr.edu	
John Stevenson	University of Delaware	varken@udel.edu	

### **Breakout Session Notes:**

**Topic**: Collection of Last Resort

Presenter: Janet Scheitle, Direct, Office of Library Program Planning, GPO

 Table Captain:
 Tom Rohrig
 Recorder:
 Gil Baldwin

### **Consensus:**

The National Collection has value as with a back-up and assurance of almost permanent loss of this historical record.

#### Concerns:

• Scope – Does it include ?????, superseded rights, archived masters, non-depository right?

• ????? – A process to ensure obtaining the best copy available

•

Action Items	Assigned Responsibility	Comments
NONE		

Name	Institution	Email Address	
Tom Rohrig	Texas Tech University	tom.rohrig@ttu.edu	
Gil Baldwin	GPO	Ebaldwin@gpo.gov	
Audrey L. Hall	State Library of Ohio	ahall@sloma.state.oh.us	
Steve Beleu	Oklahoma Dept. of Libraries	sbeleu@oltn.odl.state.ok.us	
Jeff Bullington	University of Kansas	jsbullington@ku.edu	
Mary Brewer	Arkansas State Library	mbrewer@asl.lib.ar.us	
Ann Sanders	Library of Michigan	asanders@michigan.gov	

### **Breakout Session Notes:**

**Topic**: Collection of Last Resort

Presenter: Janet Scheitle, Direct, Office of Library Program Planning, GPO

 Table Captain:
 Kathy Hale
 Recorder:
 Gretchen Schlag

Email Address: khale@state.pa.us Email Address: gschlag@gpo.gov

### **Consensus:**

This is a really good idea but there are still many details that need to be worked out, such as security, location, migration, etc. Adaptation of materials and accompanying standards should be considered. The impact on the general public would be more behind the scenes, but give them more structured access to information. This will be a boom to librarians of the future.

Action Items	Assigned Responsibility	Comments
Elicit assistance from the documents community		
Solicit material for the archive		
Coordinate with GPO on their need for material and expertise		

Name	Institution	Email Address	
Kathy Hale	State Library of Pennsylvania	khale@state.pa.us	
Gretchen Schlag	GPO	gschlag@gpo.gov	
Mike Ragen	Illinois State Library	mragen@ilsos.net	
Sandra Groleau	Bates College Library	sgroleau@bates.edu	
Lucy Farrow	Auburn University, Montgomery	lfarrow1@mail.aum.edu	
Ruth Cochran	University of Idaho	ruth@uidaho.edu	
Christine Chang	West Virginia University	cchang@wvu.edu	
Cathy Sagendorf	New York State Library	csagendo@mail.nysed.gov	
Laura Harper	University of Mississippi	lgharper@olemiss.edu	

## **Breakout Session Notes:**

**Date**: 10/16/2004 **Start Time**: 1:30 p.m. **End Time**: 3:00 p.m.

**Topic**: Collection of Last Resort

Presenter: Janet Scheitle, Direct, Office of Library Program Planning, GPO

 Table Captain:
 Geoff Swindells
 Recorder:
 Michele Worthington

Contact Phone: (573) 884-8123 Contact Phone:

### **Consensus:**

We would like to know more about the scope of the collection of last resort. We'd also like GPO to clarify the relationship between the collection of last resort and local preservation activities, and efforts to digitize the legacy collection. We'd also like to know more about the funding sources for this effort and if there has been thought given to the relative importance of the legacy collection and born digital material on this effort.

Action Items	Assigned Responsibility	Comments
We need to more.		

Name	Institution	Email Address
Geoff Swindells	University of Missouri	swindellsg@missouri.edu
Michele Worthington	GPO	mworthington@gpo.gov
Donna Vavrek	Louisiana Tech University	dvavrek@latech.edu
Rob Jackson	Denver Public Library	rjackson@denver.lib.co.us
Jan Swanbeck	University of Florida	janswan1@ufl.edu
John Walters	Utah State University	johwal@ngw.lib.usu.edu
Charles Bernholz	University of Nebraska, Lincoln	cbernholz2@unl.edu
Deborah Mongeau	University of Rhode Island	dmongeau@uri.edu
Laura Saurs	Newark Public Library	lsaurs@npl.org

## REGIONAL DEPOSITORY MEETING OCTOBER 14-16,2004 Holiday Inn on the Hill Washington D.C.

### **EVALUATION SUMMARY**

## Instructions: Please rate the meeting presentations and the facilitator on a scale of 1 to 5:

1. Too basic/to little 2. Too advanced/too much 3. Adequate 4. Good 5. Excellent

Number of Responses 47	Mean Score 3.41%
<ul><li>1. Welcome Remarks</li></ul>	3.38%
2. GPO's Integrated Library System  Comments:  a. Needed more in-depth presentation	3.17%
3. Future of Regional Libraries: Summary of ARL Survey  Comments:  a. Too fast, print too small for aging eyes.  b. No time to discuss survey	3.47%
4. Future of Regional Libraries: "Pilot Light" initiative3.43%  Comments:  a. Presentation too fast.	3.43%
5. Future of Regional Libraries: Best Practices	3.09%
6. Future of Regional Libraries: Regional Performance Survey Tool  Comments:  Interesting idea	3.79%
7. Relinquishing Regional Status Comments:  a. Well-organized, clear	3.79%

8. Consultant Initiative/Training and Development  Comments:  a. Too brief	3.06%
9. Collection of Last Resort  Comments:  a. Too brief	3.13%
10. Wrap-Up and Closing Remarks  Comments:  a. Too much	3.81%
11. Facilitator  Comments  a. Good, but sometimes seemed forced  b. Too Much!	3.36%

## **GENERAL COMMENTS**

- 1. Next time we need a bit more time (well, sometime, there was none here) to update and report on what is happening across the country. This is where we learn about initiatives and best practices from our colleagues.
- 2. Next year: More time for best practices sharing.
- 3. I think the overall meeting tone and schedule improved the second part of the meeting. The first presentation did not give enough information to give us "meat" to discuss. The opportunity to ask questions is very important and a more specific objective for the discussion is helpful.

The table captains and recorders are to be commended for excellent leadership and work. I also appreciate the change in the tone/attitude of the facilitator. Thank you.

- 4. If programs that GPO wants commitments from us to use Regional L to announce them more ahead so we can have answers ready.
- 5. It is very difficult to rate 10 minute presentations. The format was certainly not what we have done in the past and I am not entirely sure what we accomplished. I do appreciate that GPO brought us all together and perhaps after there is some synthesis of the comments I will be able to evaluate what was done.

- 6. The presentations typically served as good starting points for discussion, but I often wanted more information from the presenters.
- 7. Would have liked more group discussion of each of the topics. The presenters could have provided more information, which would have been helpful.
- 8. Could have used some resources to prep for certain topics.
- 9. Thanks for the conference and the money support so we all could come
- 10. would have liked handouts and PowerPoint's for every presentation. I really liked everyone being on time. Good opportunity for interaction.
- 11. Strange evaluation form.
- 12. Very informative and allowed everyone to contribute and not just the more vocal individuals.
- 13. Product, product, product.
- 14. Spring update on fall meeting, status of projects.
- 15. Not enough time for presentations. Some breakouts didn't have real questions to address, or we didn't have enough information to answer questions. Didn't like emphasis on discussing the "what's" only. Sometimes we didn't need 40 minutes for breakouts.
- 16. I was one of the people who said we don't need to have a 2- day meeting next year. I observed that a lot of consensus statements and action items were repeated among the 8 tables. I think a 1-day meeting with the group divided to look at different issues (instead of all participants discussing the same issues) would be an effective and cost-efficient approach, I also think that many of the issues discussed require input from selective and not solely regional issues. Focusing on regional concerns such as the collection of last resort and relinquishing regional status would help to focus the meeting.
- 17. Good conference because there was lots of opportunity for interacting with others because of small size of group. Large meetings are too anonymous. Scheduling and email feedback before conference was very poor.
  - \* All's well that ends well. \* Answers were too short and lacking in needed information. Everything had to be pried out and then there were long gaps between exchanges.

18. Rating scale is odd – going from too/much\*/too little to a more traditional rating system doesn't work for me.

A lighter hand facilitating/bell ringing on the first day would have worked better. Facilitating got better as the meeting went on.

- \* Too much information isn't an issue when I want to know what direction things are going.
- 19. I suggest focusing on fewer topics in the next regional meeting, but in more depth. Topics to consider:
  - a. Collection of Last Resort
  - b. Consultant status report
  - c. Best Practices

Cover in  $1-\frac{1}{2}$  days – one evening, plus one full day.

20. Look forward to receiving the summary analysis of the content generated here and what GOP's thought/perspectives are about it, what it means, where it is leading us.

### Potential future topics:

- a. Perhaps some work among Regionals about how to work with Selectives, particularly about thorny issues of differences in perspectives and concerns, etc.
- 21. The last day was the best. Conference would have benefited from shorter breaks and longer discussion periods. People don't need ½ hour breaks. If longer discussion periods weren't possible, shorter breaks would allow for earlier dismissal.
- 22. Presentations should be longer (30 mins) and offer more detail. Brainstorming might benefit from more focused instructions. For example, Best Practices presentation might have had instructions of: "What criteria could be used to determine a Best Practice?" Or "What have you done at your regional that could be a Best Practice?"
- 23. Presentation from new consultants (how is program going. Brief information on startup). I wish there had been a little more time at the end for further discussion on the topic. The time given at the end of the group feedback after each session on Saturday was better.
- 24. The structure set up <u>at first</u> (consensus/action item) was totally foreign to me. I was confused and felt in the dark. Only as the process unfolded with time did I begin to understand the process. I believe that it worked well.

- 25. I did not think the Facilitator was as good as others I have worked with recently. This may have been due to preparation time (things seemed in flux due to conditions).
- 26. Next year discussion of role of consultant in compliance.
- 27. I think it would have been helpful for us to understand better how the meeting was going to be run. My fear is that these meetings will dissolve into gripe sessions. More focused one day meetings might be better.
- 28. Needed more open discussion on the presentations?